
Consultants Training Catalogue

IFRS17 Expert

CCH® Tagetik | ACADEMY

To become a certified CCH Tagetik IFRS17 Expert, you must complete the IFRS17 Path. The journey consists of different milestones, each complete with a set of courses that you must attend and pass, before moving onto the next milestone.

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Welcome to the CCH® Tagetik Academy

This document contains the CCH® Tagetik Academy courses catalogue, with detailed information about optimal learning paths, duration, audience, prerequisites and topics covered in each course.

Available Learning Paths

We designed recommended Learning Path to maximize your investment in the Academy, according to your Role.

Each Learning Path shows the recommended classes and actions for an efficient on-boarding and fast enablement as a CCH® Tagetik Product Novice, Expert, Pro or Champion. These learning path can focus on Consolidation, Budgeting & Planning or Technical Knowledge.

Course Delivery

Most of Academy courses are run as 'Live' classroom training, either in person or remotely. Instructor's explanations are conducted on a training environment and supported by PowerPoint slides. In order to make the training more efficient and interactive as possible, every attendee is asked to perform a series of hands-on workshops on a standard remote application.

For selected topic, we provide also self-serve modules (e-learning, e-learning + self-practice).

Course Registration

All our Training Courses are published on our Global Calendar on our [Academy website](#).

- You can check dates, language, location and availability for each Training Course and register directly for the selected event.
- Courses can be held at Tagetik offices or on-site at the customer location.
- Even if we try to run all our scheduled classes, we might need to insert a minimum number of attendees for a training course (usually 3).

For additional information, please contact your local Academy representative, or write to info.academy@wolterskluwer.com



Data model

Duration: 1 day

Audience: Administrators and Consultants

Prerequisites: None

Objectives: This training course covers the basics of system dimensionality: data model definition and maintenance, aggregation structures and relevant information for each dimension.

Topics:

1. CCH® Tagetik architecture
2. Familiarization
3. Aggregation Structures
4. Interface navigation
5. Data model design
 - a. Periods
 - b. Scenarios
 - c. Categories
 - d. Accounts
 - e. Entities
 - f. Custom dimensions

Additional info:

- Interactive E-learning as additional asset included



Output Reporting

Duration: 2 days

Audience: Administrators, Power user and Consultants

Prerequisites: Data Model course & basic knowledge of MS Excel functionalities

Objectives : This training course explains how to design reports, using CCH® Tagetikreporting features.

Topics:

1. CCH® Tagetik Reporting introduction
2. Excel Client overview
3. Usage of a Form (Design, Navigation and Data Entry)
4. Parametric Forms
5. Basic dynamic forms
6. Smart Insight
7. Formatting best practice
8. Maintenance best practice
9. Basic usage of CCH® Tagetik style
10. Tips & Tricks

Additional info:

- Interactive E-learning as additional asset included



Data Collection

Duration: 1 day

Audience: Administrators and Consultants

Prerequisites: Data Model and Output Reporting

Objectives: This training course covers the basics of the application process setup and the main features for collecting data.

Topics:

1. Usage of a Process cockpit
2. Application process design
 - a. Business workflow setup
 - b. Application process setup
3. Data collection
 - a. Data entry form design and usage
 - b. Predefined ETL usage
 - c. Custom ETL usage
 - d. Quick Data Loader usage
 - e. Journal creation
 - f. Data processing overview

Additional info:

- Interactive E-learning as additional asset included



Analytic Information Hub Basics

Duration: 2 days

Audience: Administrators, IT Professional and Consultants

Prerequisites: Data model, Output reporting, Database file management, SQL Scripting Language (recommended)

Objectives: This training course covers the skills necessary to implement an analytical solution using the Analytical Information Hub that extends beyond the standard data model. Attendees will be taught the difference between the Financial and Analytical Workspaces, how to create analytical dimensions and different types of Datasets including standard, virtual and reference datasets. The course will provide the ability to configure the AIH calculation engine, called Data Transformation Package, and the use of data integration tools within the business workflow. Furthermore, attendees will learn how to use the reporting capabilities with the analytical workspace datasets.

Topics:

1. Analytical Workspace and Financial Workspace
2. Analytical Dimensions and Datasets
3. Data Transformation Package
4. Data integration tools (QDL, Datasource Mapping)
5. Analytical Workspace on reporting side
6. Virtual Datasets
7. Import/Export



IFRS 17 Basic

Duration: 2 days

Audience: Consultants and Implementer Partners (currently working on projects or with prior authorization)

Prerequisites: Data Model, Output Reporting, Data Collection, ETL Foundation, AIH Basic. Knowledge of IFRS17 Regulation and CCH® Tagetik Administration.

Objectives: This training course provides consultants with a foundation in the use and configuration of the IFRS17 Starter Kit, in addition to an introduction to the main topics of the IFRS17 accounting Standards. During the course, participants will gain knowledge of the IFRS17 starter kit, its engine, the inputs which are required to the tool and configuration tables. As well as theoretical topics, the course includes an hands on workshops and a practical case study.

Topics:

1. Introduction to the IFRS Solution
2. IFRS Solution Architecture and Engine
3. IFRS Input Data Model
4. IFRS Configuration and Reference Tables
5. Standard IFRS Workflow and Calculation Steps
6. IFRS Reporting
7. Case Study on BBA



Analytic Information Hub Pro

Duration: 2 days

Audience: Administrators, IT Professional, Consultants with advanced Product knowledge.

Prerequisites: AIH basic training, expertise in use of AIH, SQL Scripting Language.

Objectives: This training course covers the skills necessary to discuss, evaluate and choose among different design solution for AIH, including also technical considerations and advanced features to apply in project implementation. In the hands-on workshop all advanced configurations of datasets and DTP will be reviewed.

Topics:

1. General overview and specific consideration of design
2. Technical design guidelines
3. Solution design workshop and discussion
4. Datasource mapping
5. AIH tables and Dictionary use
6. Advanced use of Virtual Datasets
7. AIH Parameters
8. Special methods
9. DTP filtering methods
10. Reference dataset level type
11. Grouping function
12. Cell field on reporting
13. Drill-through to analytical detail



IFRS 17 Pro

Duration: 2 days

Audience: Consultants and Implementer Partners (currently working on projects or with prior authorization)

Prerequisites: IFRS17 Basic, AIH PRO. Knowledge of IFRS17 Regulation and CCH® Tagetik Administration.

Objectives: This training course provides consultants with a deeper analysis on the IFRS17 Tagetik Solution Analytical Workspace, giving a technical explanation and overview of his main components (Datasets, DTP, Special Methods). During the course, participants will gain knowledge of the specific configurations that are mostly used during the project implementation phase and will be provided with the guidelines on how to debug some of the most common issues. As well as theoretical topics, the course includes an of hand on workshop and a practical case study.

Topics:

1. Overview of IFRS17 Solution
2. IFRS17 Tagetik Solution Analytical Workspace
3. IFRS17 Solution Specific Configurations
4. Project implementation steps and Issues debug
5. Case study for advanced
6. Hand on workshop

